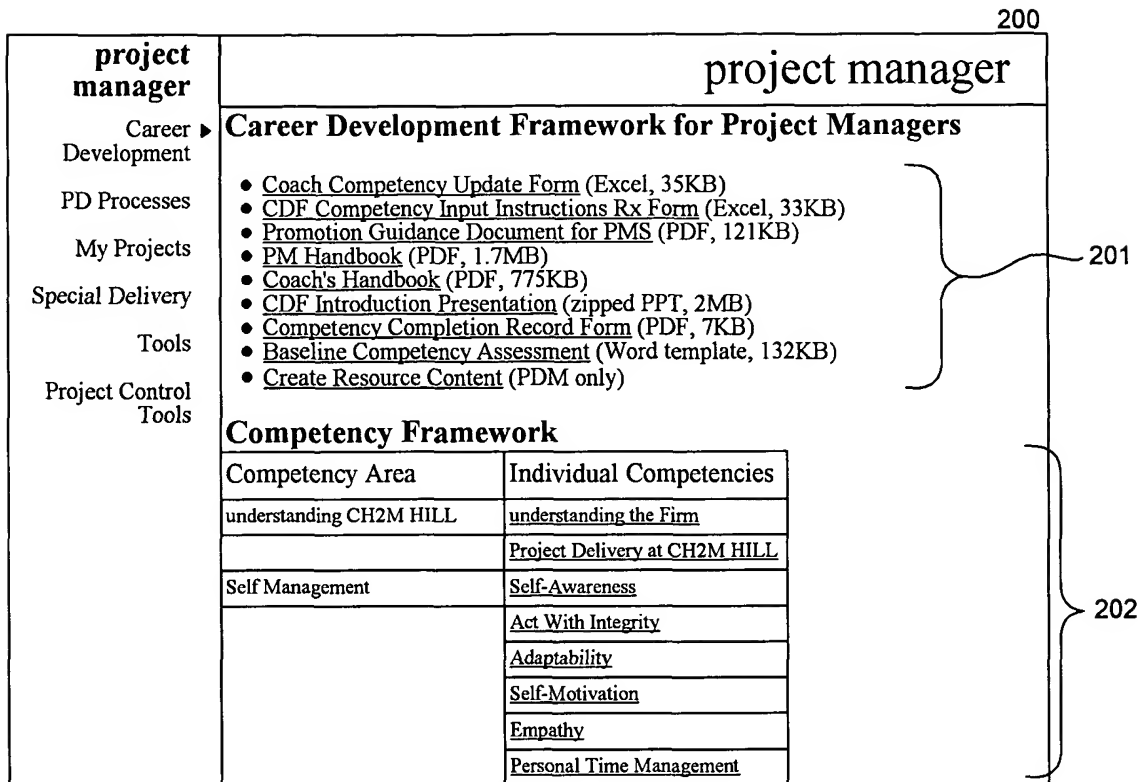
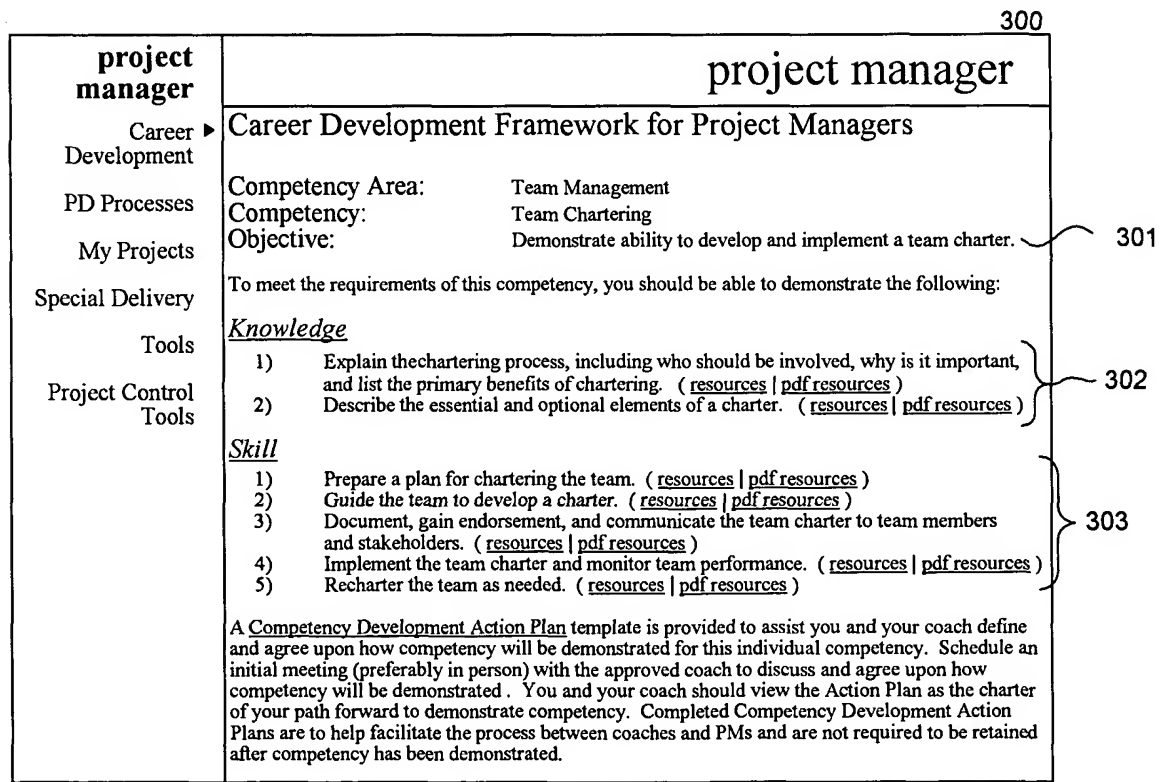


**FIG. 1**



**FIG. 2**



**FIG. 3**

## Requirements

CH2M HILL

## Prepare a plan for chartering the team.

Chartering is a structured process used to guide a project team through the process of defining itself, its purpose, critical success factors, goals, roles and responsibilities, operating guidelines, interpersonal behaviors, and other elements that give a team the clarity of purpose essential for high-quality performance. A Chartering session is typically conducted to develop these chartering elements. Careful planning of the chartering session is necessary to help ensure its success. Key questions regarding who should attend the session, the amount of time that will be dedicated, the charter elements that will be developed, and the techniques that will be used, need to be answered to plan the session and to develop an effective agenda.

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## Links

- Need a tool to help step you through the planning process for a chartering session?  
*Chartering Planner* (DOC, 376KB)
- Need a checklist for the chartering process? *Chartering Process Checklist* (DOC, 166KB)
- Need a tool to help you develop a chartering session agenda for your project?  
*Sample Chartering Agendas* (DOC, 256KB)
- Need a tool to help you select the critical elements of chartering for your specific project?  
*Charter Elements by Project Type* (DOC, 90KB)

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## Support Resources

## Experts

If you need some help with chartering, please contact: Don DeWolfe/CLT, Alan Bollinger/ATL, Allan Highstreet/SAC, Jeannine Yancey/PDX, or Linda Teirnan/COR

## Books

- CH2M HILL 2001 *Project Delivery System. A System and Process for Benchmark Performance. Charter Team*, (PDF, 489KB)

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## Library resources (videos, audio tapes)

- None identified

## Learning events

- None identified

If you have suggestions for improvements to the content of this resource page please contact the Resource Content Owners: Don DeWolfe/CLT (team Leader), Alan Bollinger/ATL, Tom Walters/MGM, and Eric Nielsen/ORL

FIG. 4

## Baseline Competency Assessment

Name: \_\_\_\_\_ Emp No: \_\_\_\_\_

	<u>My Assessment</u>			<u>PD Assessment</u>			<u>Assessment Date</u>
<b><u>Understanding CH2M HILL</u></b>							
	<u>R</u>	<u>W</u>	<u>B</u>	<u>R</u>	<u>W</u>	<u>B</u>	<u>NR</u>
<input type="checkbox"/> Understanding the Firm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Project Delivery at CH2M HILL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b><u>Self Management</u></b>							
	<u>R</u>	<u>W</u>	<u>B</u>	<u>R</u>	<u>W</u>	<u>B</u>	<u>NR</u>
<input type="checkbox"/> Self Awareness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Act with Integrity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Adaptability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Self -Motivation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Empathy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Personal Time Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b><u>Team Management</u></b>							
	<u>R</u>	<u>W</u>	<u>B</u>	<u>R</u>	<u>W</u>	<u>B</u>	<u>NR</u>
<input type="checkbox"/> Team Chartering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Endorsement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Delegation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Giving/Receiving Feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Team Building/Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b><u>Interpersonal Skills and Communications</u></b>							
	<u>R</u>	<u>W</u>	<u>B</u>	<u>R</u>	<u>W</u>	<u>B</u>	<u>NR</u>
<input type="checkbox"/> Oral Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Written Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Effective Listening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Meeting Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Conflict Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b><u>Leadership</u></b>							
	<u>R</u>	<u>W</u>	<u>B</u>	<u>R</u>	<u>W</u>	<u>B</u>	<u>NR</u>
<input type="checkbox"/> Project Leadership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Coach and Develop Others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Guide:**

Blue (B) = Have demonstrated mastery of this competency. Considered an expert

White (W) = Have demonstrated all of the knowledge and skill requirements for this competency.

Red (R) = Have not demonstrated, or have not had an opportunity to demonstrate, all of the requirements for this competency.

NR = No Rating. Not enough information to make an assessment.

**FIG. 5**

# Competency Development Action Plan

Name: Emp No.: Coach:

---

Competency Area: Team Management

Competency: Team Chartering

Objective: Demonstrate ability to develop and implement a team charter.

## Requirements:

*To meet the requirements of this competency, you should be able to demonstrate the following:*

<u>Knowledge</u>	<u>Requirement</u> <u>Completion</u> <u>Date</u>
1 Explain the chartering process, including who should be involved, why is it important, and list the primary benefits of chartering.	
2 Describe the essential and optional elements of a charter.	

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Agreed Upon Actions or Activities

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<u>Skill</u>	<u>Requirement</u> <u>Completion</u> <u>Date</u>
1 Prepare a plan for chartering the team.	
2 Guide the team to develop a charter.	
3 Document, gain endorsement, and communicate the team charter to team members and stakeholders.	
4 Implement the team charter and monitor team performance.	
5 Recharter the team as needed.	

Agreed Upon Actions or Activities

### Instructions:

PMs and coaches should use this template to document your agree-upon path forward for demonstrating the competency. The completion column is provided to track the date for which individual knowledge and skill requirements have been completed.

**FIG. 6**